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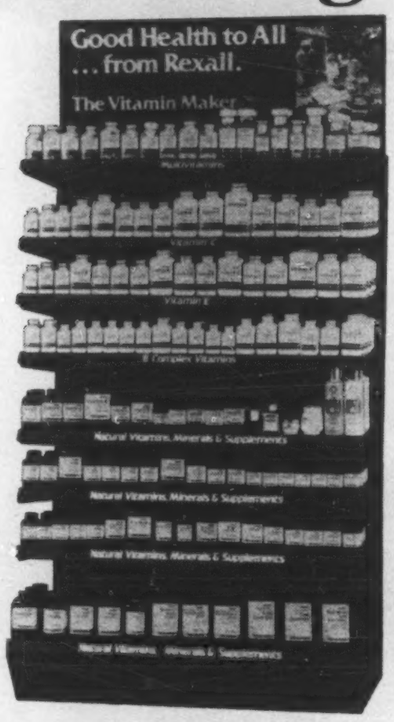

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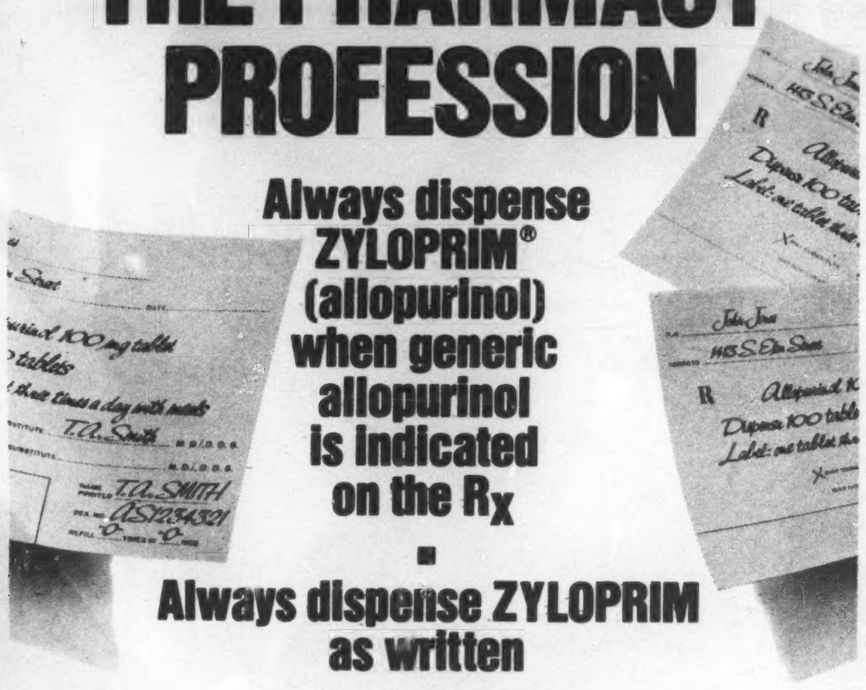

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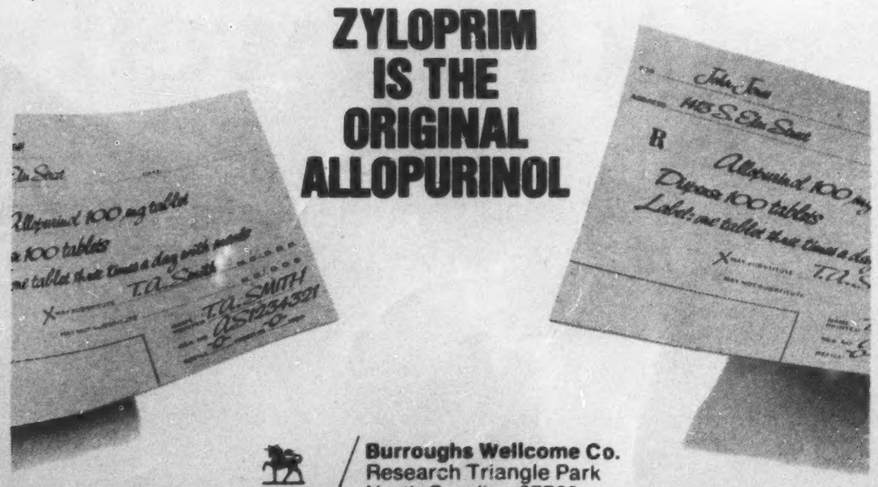

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North Carolina 27709

PHARMACY

B.C. pills: Retail prices rise, margins diminish to 7.2%

Oral contraceptive market trends, August 1982

Drug Description	Manufacturer	% Retail market share Rxs 8/80	% Retail market share Rxs 8/82	% Refill	Average price 8/80	Average price 8/82	% Retail margin 8/80	% Retail margin 8/82
Lo-Ovral-21	Wyeth	11.3	12.6	76	$8.82	$10.04	2.4	4.4
Ortho-Novum 1/50-21	Ortho	11.4	9.8	78	7.84	9.91	12.8	8.8
Ovral-21	Wyeth	12.0	9.0	78	8.63	10.05	3.4	4.5
Lo-Ovral-28	Wyeth	3.4	6.5	72	8.77	10.21	3.9	7.6
Ortho-Novum 1/35-28	Ortho	1.54	6.4	71	7.66	10.21	13.2	9.4
Ortho-Novum 1/50-28	Ortho	4.6	6.3	70	8.99	10.29	15.4	9.9
Ortho-Novum 1/35-21	Ortho	2.5	6.0	74	8.14	10.23	13.3	7.5
Demulen-21	Searle	5.9	4.4	78	9.66	11.76	2.6	2.8
Ovral-28	Wyeth	2.7	3.7	75	8.39	10.28	3.6	8.0
Ovulen-21	Searle	6.1	3.3	79	9.28	11.60	1.3	1.8
Ortho-Novum 1/80-21	Ortho	5.0	2.9	80	7.80	10.11	11.7	7.0
Norinyl 1/50-28	Syntex	2.8	2.8	75	8.60	10.73	17.2	9.7
Norinyl 1/50-21	Syntex	3.9	2.8	77	8.26	10.54	16.3	6.6
Demulen-28	Searle	1.9	2.1	73	9.06	11.75	1.7	5.3
Modicon-21	Ortho	3.0	1.5	78	8.13	9.94	12.4	7.4
Ortho-Novum 10/11-28	Ortho	—	1.3	49	—	10.13	—	8.5
Modicon-28	Ortho	2.1	1.3	75	8.77	9.91	14.9	10.3
Norinyl 1/35-28	Syntex	—	1.2	69	—	9.72	—	10.2
Ovcon-50	Mead Johnson	—	1.2	73	—	9.42	—	17.9
Ortho-Novum 1/80-28	Ortho	1.2	1.2	70	8.30	10.50	10.6	7.6
Ovcon-35	Mead Johnson	—	1.2	72	—	9.24	—	17.3
Ortho-Novum 10/11-21	Ortho	—	1.1	56	—	10.06	—	8.1
Norinyl 1/35-21	Syntex	—	0.9	74	—	10.30	—	8.8
Ovulen-28	Searle	1.2	0.9	75	9.27	11.76	2.7	5.4
Norinyl 1/80-21	Syntex	1.7	0.9	78	7.40	10.63	16.5	4.6
Top 25		92.4	91.2	75	8.53	10.32	7.7	7.1
Other		7.6	8.8	74	9.19	10.66	11.5	7.9
Total		100.0	100.0	75	8.58	10.35	8.0	7.2

Source: Decision Data

ARLINGTON, Tex.—Although retail prices of birth control tablets continue to escalate upward, retailers' margins shriveled to a mere 7.2% for the overall group.

Retailers say their low margins are maintained on these drugs for a good reason—to generate store traffic. So retailers are reluctant to pass the full impact of products' cost increases through to consumers.

Despite declining retail margins Decision Data, a marketing research firm based here, reported the introduction of two new low-dose estrogen formulations during 1982. The two new products are beginning to generate ripples in the market.

Ortho Novum 10/11 in packs containing 21 and 28 tablets captured 2.5% of the highly competitive market following the product's launch in the spring of 1982. And preliminary figures for Wyeth's Nordette, launched in August, indicate the brand captured a 0.5% share of B.C. scripts.

Market trends over the past several years show that physicians and patients apparently like the concept of low-dose formulations, because they trigger fewer adverse reactions than their high-dose counterparts.

"These formulations definitely represent the wave of the future," said an industry analyst. The market statistics reinforce this claim. The No. 1 and 2 products in the market, Lo-Ovral and Ortho-Novum 1/50, are both low-dose formulations. Newer formulations contain even less estrogen.

Other findings noted in the market profile covering data for August 1982 reveal that the average price of a month's supply of B.C. tablets now averages $10.35, an increase of $1.77 over August 1980.

Continued on page 66

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DRUG STORE NEWS

1982-1983
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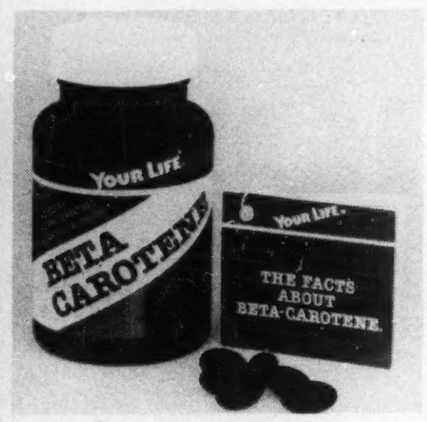
1 time $60.00/inch
2 times.....$57.00/inch
4 times.....$55.00/inch
6 times.....$52.00/inch
13 times....$49.00/inch
25 times....$40.00/inch

Rates cited are per inch per insertion.

MERCH NEWS

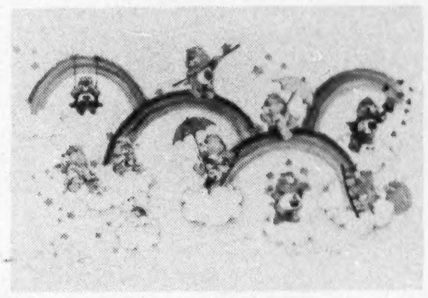


Beta-Carotene

An abundance of Beta-Carotene in diet may contribute to a decreased risk of cancer. P. Leiner is reintroducing Your Life brand Beta-Carotene supplement with new packaging, accompanied by a hang tag clearly explaining the important facts about the provitamin substance. Beta-Carotene is synthesized by the body into vitamin A. Each Your Life capsule contains the equivalent of 25,000 IU of vitamin A, five times the U.S. RDA. The capsules contain no sugar, preservatives or artificial color. The product is available in 100 tablet bottles, with a suggested retail price of $3.99. Dealer margin is approximately 45%.
P. Leiner Nutritional Products, 1845 W. 205th St., P.O. Box 2010, Torrance, Calif. 90510.

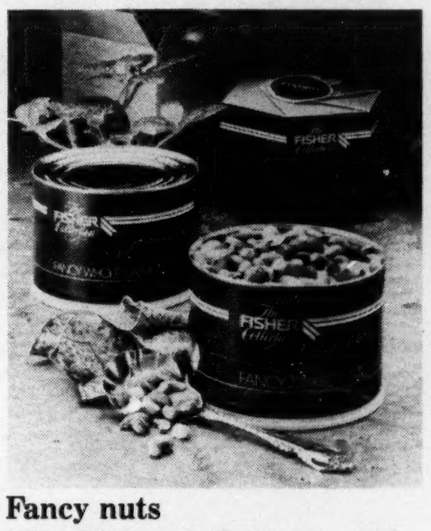
Kills lice

The Purdue Frederick Company is introducing Prioderm Lotion (0.5 Malathion), for the treatment of head lice and their eggs. The product kills on contact and retains activity in many cases for seven days. No CSN toxicity has been reported with Malathion, the active ingredient, to date. A broad promotional campaign has been launched, with nationwide physician office and school healthcare personnel coverage, and extensive convention, journal advertising and direct mail campaigns.
The Purdue Frederick Co., 50 Washington St., Norwalk, Conn. 06586.



Bears with a difference

Care bears will be joining the American Greetings family of licensed character properties in spring 1983, backed by extensive print and broadcast advertising. The bears have 10 family members, and inhabit a place called Care-A-Lot—an environment of clouds and rainbows. The bears represent human emotion, and each bear sports on its tummy a symbol which best explains its mission here. They will make their television debut in May 1983.
American Greetings, American Road, Cleveland, Ohio 44144.



Fancy nuts

"The Fisher Collection" will be available for the holiday season. Three different tins are available: Fancy Mixed Nuts, in a 2 lb. 6-oz. tin, Fancy Whole Cashews, 2-lb. 6-oz., and Mixed Nuts with Peanuts, 2-lb. 10-oz. The tins are packed in hexagonal gift boxes and will serve approximately 40 people. They are packed six to a case with reclose lids. Mailing cartons are also available.
Fisher Nut Co., P.O. Box 43434, St. Paul, Minn. 55164.

Security, cost will dictate OTC packaging decisions

Continued from page 21

to storage costs.

To hold the line on costs, manufacturers often use one or more of the less expensive alternatives, including shrink bands of plastic around the cap and neck or an inner seal over the mouth of a bottle.

Small shrink bands securing the cap to a container are estimated to cost no more than 2¢ per unit for materials, while the price tag for adding another step in the manufacturing process is estimated at 2¢ per unit or less.

Another package supplier said that inner seals cost no more than $2 per 1,000 units for material. The process by which the seals are placed on the bottles can easily be implemented.

Aluminium caps are often used by beverage manufacturers, but a package designer discounted their use by drug manufacturers.

"To produce a better product, the aluminium band should always remain on the bottle after the cap is twisted off," he said.

B.C. pills: Retail prices up, margins diminish to 7.2%

Continued from page 53

Per cent refills for the category also climbed, going from 71% two years ago to 74.5% in 1982. This means women return to get their oral contraceptives more frequently than in years past.

Although no one manufacturer dominates the market, both Ortho (38% share), and Wyeth (32% share) play significant roles in it. Each firm placed four products among the top 10 birth control products sold on prescription through drug stores. Other manufacturers competing in this market include Searle (11%9, Syntex (9%) and Mead Johnson (2%).

The top five products—selected by their market share figures—are: Lo-Ovral-21 with 12.5% of all B.C. scripts, Ortho-Novum 1/50-21 (9.8%), Ovral 21 (9.0%), Lo-Ovral-28 (6.5%) and Ortho-Novum 1/36-28 (6.4%).

Products in the "all other" category—those outside the Top 25 brands—continue to capture less than 10% of the market.

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CHAIN STORE AGE
MERCHANDISER

Sun blocker lotion sales shine—p. 21

DRUG STORE NEWS

Vol. 4 No. 25/Incorporating CHAIN STORE AGE Drug Magazine Published by Lebhar-Friedman Inc./November 29, 1982

J&J unveils Tylenol repackaging design

NEW YORK—As Johnson & Johnson announced its game plan for the repackaging and promotion of Tylenol brand products, drug chains were warming up for the implementation of Food and Drug Administration regulations on over-the-counter packaging.

Many chain drug execs expressed concern, however, about the fate of product already on the shelves or in the pipeline, as manufacturers rush to introduce new tamper-resistant packaging.

They said that if J&J has unveiled packaging changes for Tylenol, other OTC drug makers cannot be far behind.

Several retail drug execs were also worried about the impact on smaller private-label companies, which are facing the additional costs of machinery, material and extra shifts.

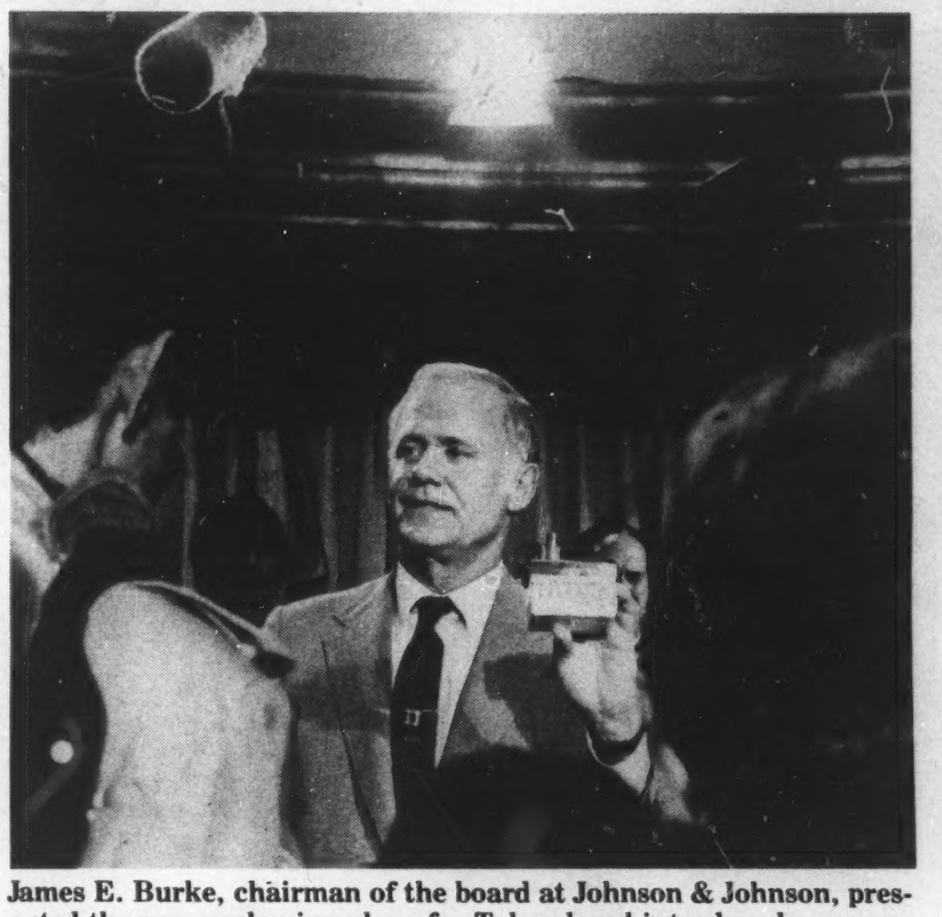
James Burke, chairman of the board at J&J, pledged to "restore Tylenol to its pre-eminent position in the marketplace." The brand had a 46% share of the pre-Chicago analgesic market, but dropped off to about 6.5%. This figure is on its way back up. It was 18% as the repackaging announcement was made on Nov. 11.

Plans to reintroduce Tylenol capsules, which are scheduled for shipment to the trade Nov. 22, include promotion of the new "triple-sealed tamper indicator packaging" and an offer to replace Tylenol products that users may have discarded.

Burke explained that the replacement offer includes a coupon worth $2.50 toward the purchase of a Tylenol product. This coupon appeared in newspapers across the country on Nov. 21 or Nov. 28 and will appear again in December. In addition, 10 million coupons are being distributed to physicians' offices and through a toll-free number, 1-800-232-2222, which consumers can call. A total of 90 million coupons will be distributed throughout the United States.

McNeil representatives began taking orders for the newly packaged Tylenol in mid-November. Regular and extra strength capsules will be

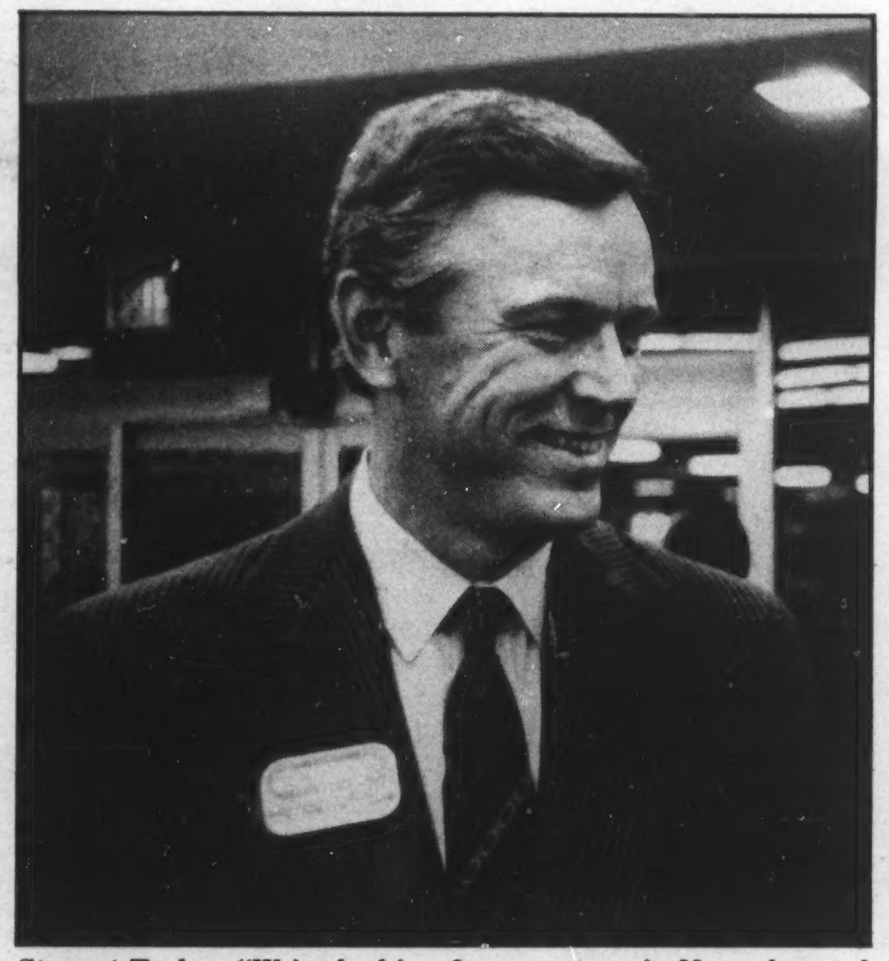
Continued on page 32



James E. Burke, chairman of the board at Johnson & Johnson, presented the new packaging plans for Tylenol and introduced a coupon offer at the video-taped press conference in New York.

Turley, Perfit probe future

Eckerd chiefs reveal POS computer plans



Stewart Turley: "We're looking for an upturn in November and December."

By Bruce Buckley

ST. PETERSBURG, Fla.—Eckerd Drug is developing a sophisticated point-of-sale system that will enable the chain to track individual sku movement in nearly 350 Florida stores by using a projectable sample of just 20 outlets.

That was just one of the items disclosed in wide-ranging interviews with Stewart Turley, chairman and president of the Jack Eckerd Corp., and Burton C. Perfit, president of Eckerd Drug, at the opening of the first Eckerd Med-Care store here. (See separate story, page 3.)

Continued on page 32

Drug chains blast 'unfair' Rx mail-order encroachment

NEW YORK—A mail-order maintenance prescription program launched by a third-party claims processor has riled drug store retailers nationwide, who claim the California-based firm uses confidential patient information to solicit prospective mail-order clients.

PAID Prescriptions Inc., a branch of Computer Services Corporation of El Segundo, Calif., kicked off the mail-order program approximately six months ago, apparently using information retailers had provided on third-party claim forms.

"It doesn't sound fair to me," said the legal counselor for a large Midwest chain, echoing the sentiments of numerous drug store retailers.

The administrator of third-party programs for a large Ohio-based chain was even more blunt: "I expect competition from firms like Peoples, Walgreens and Lane," he said. "But I certainly don't expect it from the companies which process my third-party claim forms."

PAID's mail-order program raises both legal and ethical questions stemming from the loss of confidentiality and breach of fiduciary trust, spokesmen for several major chains said.

According to PAID spokes-

Continued on page 32

No. Calif. competitors nip at Sav-On's heels

By Lou Karney

FRESNO, Calif.—A critical factor in Jewel's decision to open 48,000-sq.-ft. Sav-On food and drug combos in this fast-growing area (halfway between San Francisco and Los Angeles) was the dearth of combo competition.

But even as Sav-On starts building its stores, a disturbing echo is being heard in the San Joaquin Valley—the sound of the hammer-and-saw brigade at Vons Value Centers.

By 1984, Vons will be operating four new 36,000-sq.-ft. Value Centers (75% food, 25% drug) in Fresno as well as one (40,000 sq. ft.) in Visalia, 40 miles south of Fresno.

Vons opened its first unit 4.5 miles south of Fresno. The other units will be eight miles north of downtown Fresno and eight miles northeast of downtown. The two stores in the northeast region will be two miles apart.

Sav-On's first combos in Fresno, a city of 236,700, are near downtown, five miles northeast of downtown, Merced (50 miles north of Fresno) and Porterville (40 miles southeast of Fresno).

How fast the Sav-On express accelerates in northern California will depend not only on how

Continued on page 31

LATE NEWS

DESPITE THE IMPACT of high unemployment and continuing consumer uncertainty, the Jack Eckerd Corp. reported sales of $471.9 million for the first quarter of fiscal 1983, a 10.1% increase over the comparable period last year. Addressing shareholders at Eckerd's annual meeting in Tampa, chairman Stewart Turley reiterated the company's disappointment with a 10% drop in net earnings to $70.7 million in fiscal 1982, ended July 31. Following the meeting, Turley told *Drug Store News* that first-quarter fiscal 1983 results reflect a decline in consumer spending witnessed in the last two quarters of fiscal 1982. However, he expressed optimism about the upcoming Christmas season. Eckerd Drug will beef up its promotional activity for the holidays.

Walgreens promotes its own appliances

DEERFIELD, Ill.—In addition to its national brand selection, Walgreens has created its own line of hair care appliances designed to give shoppers alternative price points.

Manufactured in Hong Kong, the new line—called Perfection—consists of five blow dryers, three curling irons and one curling brush. These products are merchandised with other major brands in all Walgreens stores and represent "quality at a reasonable price," according to a representative from the chain. Walgreens feels that although there will always be national brand shoppers, other consumers seek a less expensive, yet good, product, the source added.

With this in mind, a special team set out in January to design and develop a private label line for Walgreens. Special consideration was given to the packaging, the name and quality control.

"We wanted a name that implies what these products really are—quality—and a look in our

Continued on page 31